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ABSTRACT

This case study of Southern Illinois University was conducted to determine the types of volunteers needed for an annual fund drive. Based on a random sample of 138 alumni donors who completed questionnaires, a donor profile was developed. Analysis of questionnaire responses found that only 48% reported being involved with extracurricular activities while attending college, 87% of which reported involvement in one to three student activities. Of respondents reporting involvement, 53% reported holding a leadership position on campus. Most respondents lived on campus and 23% graduated with honors. Most respondents (85%) indicated a strong satisfaction with their undergraduate experience and 94% said they would recommend their alma mater to incoming freshmen. Findings indicated that student undergraduate involvement was not a key to later participation in giving but that later donors were above average academic achievers and very satisfied with their education. Includes 38 references. (DB)

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Alumni Donor Research: Uses In Volunteer Recruitment

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RUNNING HEAD: Alumni Research For Volunteers

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Abstract

Colleges and universities have increasingly turned to fund raising activities as state, local, and federal funding has failed to keep pace with inflation. As these activities and efforts have become more complex, research on potential donors has become an integral part of the development program. Alumni research, however, also has the potential to influence the recruitment of volunteers and the philosophy of advancement activities.

This case study was originally conducted to determine the types of volunteers needed for an annual fund drive. Through a random sample of alumni donors, a donor profile was developed which in turn led to the renovation of volunteer recruitment.

Introduction

Both higher and secondary education have faced a variety of challenges throughout the 1980's, and with state, federal, and local funding which has failed to keep pace with inflation, difficult times are predicted for the future financing of education (Anderson & Massy, 1989; Chabotar, 1989; Brademas, 1982). With this reduced public support, many institutions have begun to rely on private fund raising efforts to supplement lost income. This reliance on private gifts has produced record amounts of giving to education, which exceeded $8 billion in the 1986-1987 fiscal year (Goss, 1989), as compared to only $191 million in the 1953-1954 fiscal year (Pollard, 1958). Due to increased competition for philanthropic dollars, the stock market crash, and the 1986 Tax Reform Act, however, giving to education fell over 3% during the 1988 fiscal year (Goss, 1989), and some institutions reported declines in giving over 30% (Putka, 1988). The instability of charitable giving was reinforced during 1989, as giving rebounded by almost 9%, but warnings of over-saturation due to competition between non-profits threatens the future of philanthropy (Bailey, 1990).

To respond to this decline, and to facilitate the need for additional revenue, many institutions and professional associations have attempted to make the fund raising process more systematic. Research dating as far back as 1958 has attempted to identify what motivates donor giving. Several of these studies have found undergraduate involvement to be a factor in an alumnus' decision to give (Baughman, 1958; Tyus, 1958; Indiana Alumni Magazine, 1969; Gardner, 1975; Nelson, 1984; McNally, 1984; Dietz, 1985; Hammersmith, 1985; Haddad, 1986), while other studies have found relationships between giving and a feeling of obligation to society (O'Connor, 1961), attitudes toward the institution (Hall, 1967; Chewning, 1984; Korvas, 1984), participation in alumni

activities (Caruthers, 1971), loyalty (Dove, 1987), participation in other voluntary organizations (Markoff, 1978), self esteem and altruism (Anderson, 1981), and the state of the economy (Leslie, Drachman, Conrad, & Ramey, 1983; Leslie & Ramey, 1985). Other studies found differing results for participation in student activities (Miller, 1988), while still other research projects have focused on demographic variables (Spaeth & Greeley, 1970; Belcher, 1988), fund raising procedures and practices (Wolshon, 1981), and fund raising office structures (Paton, 1982). The common consensus for this body of literature indicates that no single variable alone can predict an alumnus' decision to give.

This research also emphasizes the concept of alumni donor research, that is, the investment of time, resources, and energy to understand something of the history and motivations alumni. This research can take several forms, possibly including mail and telephone surveys, alumni census surveys, and regional and local newspaper clipping services. Through these instruments, a variety of information on not only the alumni sampled, but also the entire alumni population can be identified. Many surveys have historically focused on demographic information, including gender, birth date, number of children, annual personal and household income, occupational field, business affiliation, political affiliation, religion, etc. More advanced surveys, however, encompass interests (political, business, local issues, etc.), student involvement, attitudes toward the institution and specific academic programs, and community involvement.

Through the instruments listed and the results which they yield, alumni donor research has been defined as "a process of following alumni through their lives and focusing on lifelong demographics, attitudinal issues, and career data in order to understand more fully the underlying motivational forces of alumni as providers" (Melchiori, 1988, p. 10).

Early forms of donor research existed in the medieval universities of Europe during the 1100's and 1200's. These institutions had difficulties with the communities in which they were located, and the exploitation of students was common; overcharging for room, board, and books. To respond to these problems, college founders worked to locate and identify businessmen sympathetic to university students. In doing so, they were able to establish fair-priced residence and board packages for students (Rashdall, 1936). This research to identify merchants and businessmen in favor of education eventually led to the establishment of the first university endowment to build and maintain private housing for students at the University of Paris in 1158 (Haskins, 1957).

In the United States, the Colonial Colleges were originally dependent upon legislatures, city councils, and even church congregations for their funding. As they expanded to incorporate students from varied backgrounds and religions, however, these sources became reluctant to continue their funding. With decreased church revenues and a legislative view that colleges harbored heretics, colleges were forced to turn to alumni to replace lost dollars (Maxwell, 1965). By 1792, Yale was electing a class secretary to keep track of all alumni and their activities. These efforts, and programs similar to this at institutions such as Princeton, Harvard, and Williams College eventually led to the formation of the first alumni societies and alumni fund raisers.

Case Study

The College of Education at Southern Illinois University (SIU) currently implements a variety of fund raising and alumni relations programs to maximize alumni participation in the annual fund. During the year of study, the College participated in a university wide annual telefund and raised over $50,000 in pledges. Other activities have included extensive homecoming programs, alumni receptions, alumni achievement awards, and

promotional mailings.

Perhaps the most innovative component of this external relations program is student involvement in virtually all alumni activities. The justification for this involvement not only arose out of a necessity to recruit volunteers, but is primarily based on the Involvement in Learning concept (Astin, 1985). This student development component maintains that students who are involved with activities develop a greater appreciation for their experience on campus, achieve better in the classroom, and are more satisfied than non-involved students with their collegiate experience.

Volunteer students, recruited through student organizations within the College, were the main source of telefund callers. Unfortunately, with telefund calling scheduled near homecoming and mid-term examinations, a busy time of the semester for students, made the recruiting of student organization members to call difficult and time consuming. With few student volunteers able to make phone calls and the raise alumni support which had become necessary, the College was interested in using students who had more available time (i.e. fewer demands placed on their time by student organizations) and fewer commitments to volunteer for the College's calling.

The administration proved to be hesitant concerning this concept, as it was accepted that alumni are at least partially responsive to the telefund program because they are contacted by students who were involved with the same activities that they were involved with as undergraduates. Prior to preceding with the volunteer recruitment, it was decided to survey alumni to find out why they give to the college, and to at least partially test their concept of undergraduate "involvement" resulting in giving. Other measures of satisfaction with the college experience, housing, and academic success were also measured to better understand the alumni population of donors.

The research sample consisted of 200 College of Education alumni donors who had

directed their financial contribution through the university's foundation. The sample utilized fiscal year 1988 data, and was approximately one-tenth of the college's donor base. The sample size was determined based on two factors: cost considerations, and Fowler's (1984) work which indicated that reliability from samples sizes with 150 to 200 participants increases only slightly. The sample was compiled in cooperation with the university's alumni services office using a computer program of random numbers, and utilized only bachelor degree graduates, meaning that the sample excluded multiple degree and husband-wife degree graduates, and advanced degree graduates. Only current donors that listed a graduation date after 1950, the time period when the majority of donors graduated, were used.

A 16-item survey was designed, and a response rate of 69% was achieved through a follow-up mailing. All surveys were manually tabulated using frequencies to determine the alumnus' likelihood of possessing each particular characteristic. Validation questions were included to detect possible sample errors. In the tabulation of results, 138 responses, that is 69% of the questionnaires mailed, were used.

Of the respondents to the questionnaire, only 48% reported being involved with extra-curricular activities. Of those responding positively to involvement, 10% reported involvement in four to six activities, three percent reported involvement in seven to ten activities, and the remaining 87% reported involvement in one to three student activities. The most frequent types of activities were departmental with 20% of the respondents, followed by Greek-letter organizations, intramural sports, and special interest groups, all reporting a 14% response.

Of those who reported being involved, 53% also reported holding a student leadership position on campus. The most frequently identified organization in which the leadership position was held was in Greek-letter organizations (20%). Departmental

student organizations were the second most popular selection (18%), and special interest groups followed (15%). For individuals that did not hold leadership positions, 25% of the respondents reported above average involvement. The majority of the respondents in this category, however, rated their involvement as moderate (41%). .

On-campus residence halls and community rental units were the most common housing arrangement responses. The write-in response of "home" and "commuted" was the third most popular living arrangement (19%). Of those that reported that they lived on-campus, 27 donors reported doing so for only one year, and 10% reported that they lived on-campus for three years. The remaining donors (7%) lived on-campus for all four of their undergraduate years.

When asked if the alumnus graduated with honors, 23% answered affirmatively. When asked to rate academic success, 60% of the alumni reported achieving above average academic success, and 30% reported average academic success as undergraduates. Satisfaction with the undergraduate experience received the only clear consensus of responses, with 85% of the respondents indicating a strong satisfaction. The same percentage was achieved when asked if the alumnus would repeat the experience at SIU. This response increased to 94% when asked if they would recommend their alma mater to incoming freshmen.

Interpretation of Results

The College fashioned it's institutional advancement programs on undergraduate student involvement for two purposes: to build a sense of awareness of alumni support among undergraduates, and to provide a possible means of communication between alumni and students. To respond to the difficulty of recruiting student volunteers, an alumni survey was developed to test the relationship of undergraduate involvement and alumni

giving. The results of the study indicated in approximate terms, that there was no significant relationship between alumni giving and undergraduate involvement or housing on campus. Additionally, the survey revealed that there is at least some degree of a relationship between alumni giving and the alumnus' academic success and satisfaction.

Based on the high percentage of returns with only two mailings, the College concluded that the typical donor is concerned about the future of the institution, and cares enough to respond to requests for information. The alumni who responded not only illustrated their commitment to the institution by answering the questions related to satisfaction, but also illustrated their pride by simply returning the questionnaire.

The focus of this alumni survey research was a question of the use of student volunteers: should only involved students be used. The responses indicated that involvement was not a key to participation in giving. The responses did indicate that donors were above average academic achievers and are currently satisfied with the education received. Therefore, the College's administration felt comfortable in utilizing volunteers that were not involved in student organizations.

The results of this survey did cultivate the following questions to be considered:

1. **How can programs targeted at high academic achievers be developed and implemented?**
2. **Should a special effort be made to employ the services of students in the honors program?**
3. **What tactics can be used to measure satisfaction with education prior to solicitations?**

Discussion

Alumni research has become increasingly important to fund raising programs as advancement activities have become more systematic in their approach. Research on

alumni has the potential to crystallize the characteristics of donors, and increase the effectiveness of fund raising programs. These surveys and research efforts, however, need not be focused only on searching for individual demographic data. Finding generalizable characteristics of donors can also be helpful in understanding what makes alumni respond.

The survey implemented at SIU came about due to a very real problem facing many institutions: decreased volunteerism by undergraduates. As this College of Education was dependent on the giving of time by students, its' alumni programing success was forced to be re-evaluated. Through donor research, the advancement officers were granted the flexibility of working with students from all background in the College. This flexibility in recruiting volunteers resulted in the filling of telefund volunteer positions, and an increase in funds raised to over $70,000.

Perhaps the largest concern for the implementation of the study was the length of time since graduation for alumni who had been out over ten years. This was decided to be a possible factor in the high, self-reported academic achievement. To prevent possible future distortions, and to obtain a more accurate indication of involvement, housing, and satisfaction, it was proposed that a questionnaire be developed and administered to graduating seniors in the College. By providing an "exit-interview" type opportunity, the potential will exist to better target future alumni programs.

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